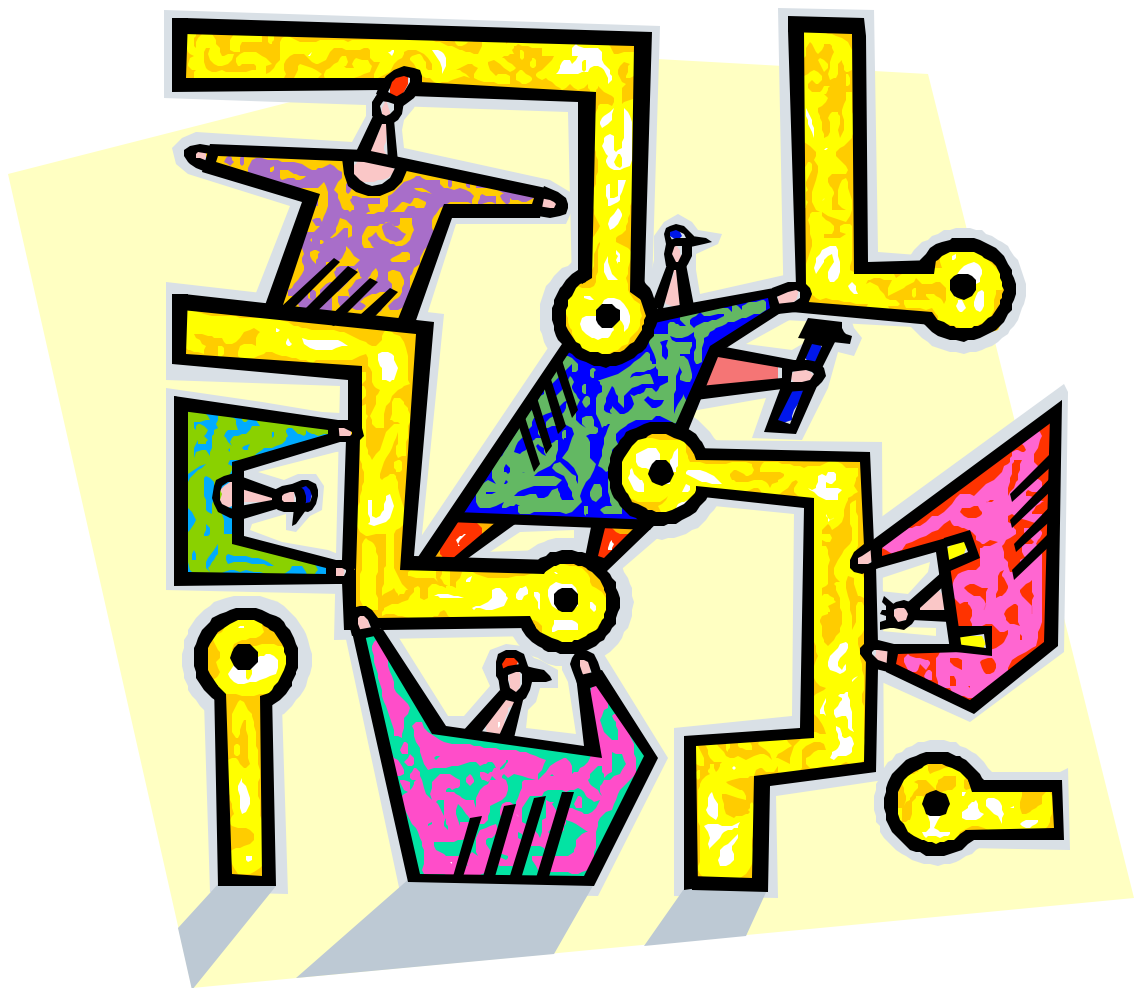# Project Management Framework

Implementation and Transition Plan Template

Project Name _____   **Project Manager** _____

Implementation and Transition Plan Template

Task Description	Resource Assigned	Date Due	Timing/ Dependency	Status
Obtain Customer Acceptance – Approval to Implement				
Finalize Implementation Plan				
Review implementation plan				
Approve implementation plan				
Conduct Dry Run Test of Implementation Plan				
Prepare test environment				
Conduct dry run test				
Modify Implementation Plan based on test results				
Notify Customers of Implementation				
Prepare notification document				
Notify customers				
Prepare Production Environment				
Identify hardware, software, and network connection needs				
Acquire & install hardware				
Acquire & install software				
Configure workstations				
Install database(s)				
Determine telecommunications needs				
Establish network connectivity & capacity				
Prepare Training Environment				
Identify needed training facilities, tools and equipment				
Schedule trainers				
Secure training facilities				
Procure necessary equipment				
Obtain other tools needed for training				
Install necessary training equipment				
Schedule training and invite trainees				
Refine training materials & curriculum				
Make sure there are enough logon ids for training				
Test accessibility to system from training site				
Conduct training				
Install Production System				
Define and establish needed security at all levels				
Define production run				

schedules of batch processing and apply to automated scheduler				
Move application to production environment				
Convert any necessary data				
Release to customers, production and staff				
Update Project Control Documents				
Risk management plan				
Communication plan				
Quality assurance plan				
Lessons learned session and documentation				
Additional Project Closeout Tasks				
Complete inventory of documentation				
Facilitate and transfer of knowledge that needs to occur				
Release resources				

Project Name _____ **Project Manager** _____

Transition Plan Template
(The tasks listed below are a suggestion only.)

Transition Task Description	Resource Assigned	Date Due	Timing/ Dependency	Status
Coordinate Transition Planning Meeting				
Develop Transition Task List				
Identify project activities to be completed before transition can begin				
Determine transition timeline				
Establish transition milestones				
Determine Staffing Needs				
Develop matrix of required resources/skills				
Conduct skill gap analysis against all technical staff				
Establish Roles & Responsibilities				
Determine roles and responsibilities (such as collect, review, accept deliverables, resolve variances, etc.)				
Assign support staff to the application				
Establish support expectations for technicians				
Assign evaluator for each transition deliverable				
Establish callback lists				
Establish helpline and customer support assignments				
Identify and obtain necessary training				
Determine actual training needed, based on gap analysis				
Develop training plans				
Develop training materials (if needed)				
Schedule training				
Obtain training				
Technical transition activities				
Obtain access/privileges				
Acquire software license agreements for production support				
Transition Communications				
Notify business unit of production support procedures				
Additional Transition Tasks				
Move development documentation and code to production repository				
Transfer user group/steering committee leadership to				

Project Name _____　　**Project Manager** _____

production support				